

# THOMAS MOSLEY

Product & Data Leadership Portfolio | Charles Schwab 2015–Present

Product Owner • Enterprise Financial Data Platforms & Strategy • Alteryx Advanced Practitioner

## WHO I AM

I am a Product Management and Data Solutions leader with 10 years at Charles Schwab. My career sits at the intersection of product ownership and data reporting/engineering, a combination that allows me to translate complex business needs into scalable platform solutions while maintaining a deep technical understanding of the underlying data.

For the past two years, I have held two senior-scope roles: Product Owner for a Portfolio Performance Engineering scrum team and Data Services Lead for Digital Advisor Solutions. This dual responsibility, which typically represents two separate headcount positions, has defined how I work with full accountability for both strategy and execution.

## DUAL-ROLE SCOPE: WHAT I ACTUALLY DO

The following table reflects responsibilities executed concurrently across both roles since late 2023.

As Product Owner — Topaz PPE Scrum Team	As Data Services Lead — Digital Advisor Solutions
<ul style="list-style-type: none"><li>• Backlog ownership and prioritization</li><li>• PI planning and sprint management</li><li>• Stakeholder alignment across 6+ partner groups</li><li>• Requirements definition and acceptance criteria</li><li>• Production support triage and escalation</li><li>• Distributed domestic and international team leadership</li></ul>	<ul style="list-style-type: none"><li>• Alteryx workflow design, build, and maintenance</li><li>• Data conversion and custodian feed management</li><li>• Historical Schwab Data request fulfillment and validation</li><li>• Internal tool ownership and enhancement (Asset Review, ICE)</li><li>• GCP platform migration and workflow transition</li><li>• High-net-worth client data conversions (UHNW / Albridge)</li></ul>

## ENTERPRISE IMPACT & QUANTIFIED OUTCOMES

All metrics below are derived from documented performance outcomes and stakeholder usage across enterprise platforms.

Category	What I Built or Delivered	Measured Outcome
Automation	ISO-20022 address parsing tool (Alteryx) converting 300,000+ AS wire standing authorizations into compliant format	<b>270,000 representative minutes saved</b>
Internal Tools	Asset Review & ICE Tool — owned, maintained, and enhanced; used across Advisor Services, Investor Services, and Workplace Services	<b>6,000+ annual runs by dozens of business partners</b>
Data Requests	Built Alteryx Gallery application to standardize HSD (Historical Schwab Data) validation; personally fulfilled and validated high-complexity requests	<b>373 HSD requests managed in 2025; 155 personally validated</b>
Product Delivery	Led Topaz scrum team through full PI including unplanned work absorption without degrading planned feature delivery	<b>101 production stories in 2025; 29 unplanned items absorbed</b>
Data Conversion	Built Albridge-to-PPE conversion tool from scratch; extended architecture to support Orion data inputs	<b>Scaled from 100 accounts in mock run to thousands in production</b>
Process Engineering	HDL (Historical Data Load) workflow optimization redesign for Alteryx workflow	<b>Runtime reduced from ~60 minutes to 10 minutes</b>

Platform Migration	Led Team's GCP Alteryx workflow migration; facilitated knowledge transfer and team transition from IDW to Google Cloud	<b>Zero production interruptions during migration</b>
Client Reporting	Edelman Financial Engines' custom report using ASDD file knowledge for high-profile TDA Integration requirement	<b>Met complex institutional reporting requirements with zero rework across cross-functional teams</b>
API Integration	Identified and implemented Jira API connection solution for Tax Loss Harvesting project that had been blocked	<b>Unblocked initiative; eliminated manual report generation</b>
Platform Compliance	Led SHA-1 remediation, Kafka messaging integration, and GitHub migration for production performance pipelines	<b>Zero production incidents; all compliance deadlines met</b>
Multi-Team Scope	Owned up to two PPE scrum teams with full PI planning for both	<b>Full PI planning ownership for two concurrent scrum teams with zero delivery gaps</b>

## TECHNICAL SKILLS & COMPETENCIES

### Product & Delivery

- Product Ownership & Roadmapping
- SAFe Agile / PI Planning
- Technical Product Management
- Backlog Management & Prioritization
- Stakeholder Alignment
- JIRA / Confluence
- Discovery & User Research
- Product Strategy

### Data & Engineering

- Alteryx Advanced Practitioner
- Microsoft SQL Server
- Google Cloud Platform (GCP)
- Python
- Tableau
- Splunk
- Google BigQuery
- Automation

### Domain Knowledge

- Financial Services / Fintech
- Portfolio Performance Reporting
- Advisor Services Technology
- Retail Enterprise
- Data Migration & Conversion
- Custodian Platform Integrations
- Cross-Team Enablement
- Production Support & Triage

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